

Getting started with a project plan

Using estimation to set project timelines

Utilizing tools to build a project plan

Video: Developing a project schedule
5 min

Practice Peer-graded Assignment: Activity: Estimate a project plan in a Gantt chart
1h

Video: Project plan best practices
5 min

Reading: Creating a project plan: Tools and templates
20 min

Reading: Introduction to Kanban boards
20 min

Practice Quiz: Test your knowledge: Utilizing tools to build a project plan
4 questions

Review: Building a project plan

Introduction to Kanban boards

Kanban boards are a visual tool used to manage tasks and workflows. Kanban boards can be created on whiteboards, magnetic boards, poster boards, computer programs, and more. Tasks associated with the project are written on cards. These cards are placed in columns, which represent the progress made.

Although Kanban boards are useful for all kinds of projects, they are typically most suitable for project teams working in an **Agile** project management approach. You may remember that Agile project management is an iterative approach to managing projects that focuses on continuous releases and incorporates customer feedback with every iteration. Once you become a project manager and have created your project plan, you can decide whether a Kanban board is right for your project.

Purposes of a Kanban board

Kanban boards are used to:

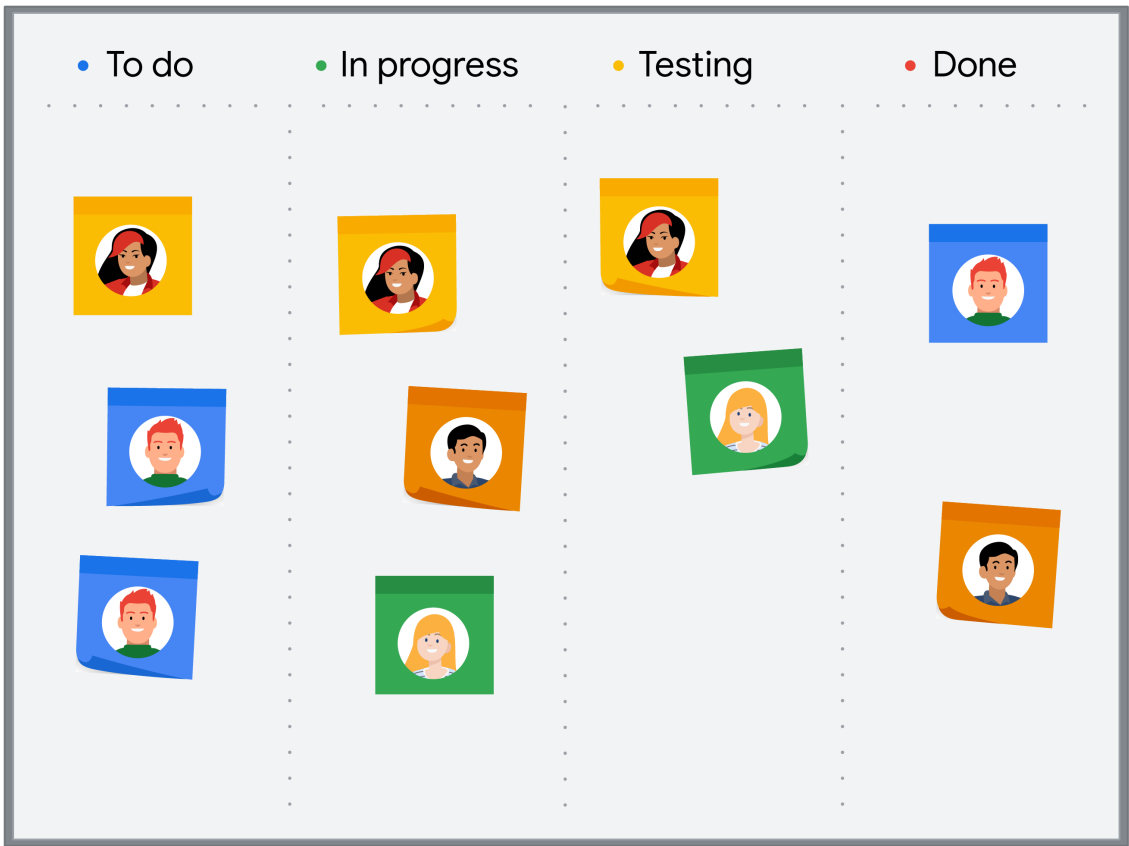
- Give a quick visual understanding of work details and provide critical task information.
- Facilitate handoffs between stakeholders, such as between development and testing resources or between team members who work on related tasks.
- Help with capturing metrics and improving workflows.

Using a Kanban board

Before creating a board, it is best practice to gather the necessary information and lay out key elements, such as tasks, status, dates, and durations. That information is useful when building your board.

Let's turn our focus to an example of a Kanban board below. Each colored rectangle is associated with a task. The tasks are represented horizontally across the effort timeline. Each column represents where the task is in relation to its completion. So as a task is started, it will move from *to do*, to *in progress*. When the project is almost ready to be released or complete, it will move to *testing*, and when it is tested and approved, it will move to *done*. Note that this is just one example of a Kanban board, and depending on the tool you use—such as software or a physical board—you can customize your board using various columns and cards. The board can also have rows for resources (team or person), to help visualize who is actively working on what.

Kanban board



Creating cards

Cards will vary in style—you can even use sticky notes on a whiteboard—but most cards will contain a few key details about the task that they represent. When using physical cards, teams often use both sides. Here is what both sides of the card should include:

Front

- **Title and unique identifier:** Make sure you have a quick reference for tasks and ID numbers.
- **Description of work:** Briefly describe the task to be accomplished. Remember that this is intended to be captured on something no larger than an index card.
- **Estimation of effort:** Estimate the amount of work it will take to complete the task. For example, you can write “small,” “medium,” or “large” to indicate the level of effort you think that task will involve.
- **Who is assigned to the task:** Indicate who is responsible for completing the task; ideally, one person per card.

Back

- **Start date:** Include the start date of the task for use in metrics, tracking, and ensuring that your time estimate is accurate.
- **Blocked days:** Indicate which days your task may be halted. A task can become blocked if it can't continue to be worked on. For example, if you were supposed to receive a deliverable and it hasn't been delivered yet, then your day may be blocked for this particular task.
- **Finish date:** As with any plan, it is important to track when the task is supposed to be finished. This allows you to ensure that your project is still on track to reach the end goal.

Kanban board software

If you opt to use a software tool rather than a physical board, you have a few options. [Asana](#) and [Trello](#) are both great software tools to use if you are looking to introduce Kanban to your project. There are many options, so take the time to evaluate which is best for you and your project.

